Society of American Archivists
Council Meeting
November 20, 2020
Virtual Meeting

Staff Report: Technology
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Most of the activities of the Technology and Operations team falls under Goal 4 of the Strategic Plan: "Meeting Members' Needs." Our aim is to support the technologies and tools that empower our members and equip staff to deliver excellent service.

2020 Annual Meeting

We had to pivot quickly to convert our plans for an in-person conference to a virtual conference this year. This required a huge allocation of staff resources, and the staff should be commended for their efforts. Unsurprisingly, a virtual conference demands more from the IT department, but the entire staff supported the considerable behind-the-scenes work—rapidly learning new tools and technical tasks. As has been reported elsewhere, the Annual Meeting was a huge success (for all its inevitable imperfections) and was very well-received by participants. It is hard to imagine any other staff of our size getting such excellent results on such short notice.

Of course, we are already applying lessons learned and discerning how to make the 2021 Annual Meeting as successful in the midst of continuing uncertainties.

Association Management System

And now that we are on the other side of the Annual Meeting, much of our attention returns to projects that continue to leverage our association management system (AMS), NimbleAMS (which is built on Salesforce).

Front and center are the final stages of a project long in the works, bringing the full power of the system to bear on managing and tracking course credits for our continuing education programs (DAS and A&D). We've done a huge amount of data cleaning and are now finalizing our reporting tools for the Education team. We are already finding that staff can assist members more quickly in relaying program information or resolving issues. And we've dramatically reduced the manual effort in tracking the credits across multiple systems that have plagued the Education team for years. (This is especially important because our Education team is short-staffed and BUSY these days!)

Once fully completed, this project will:

- Provide robust and accurate reporting tools to the Education team for program administration.

- Strengthen the team's ability to market and schedule courses that are responsive to members who are pursuing a certificate.

- Allow members to view their progress in the DAS or A&D programs in Community Hub. (This is the ultimate goal, and we're taking pains to make sure members will see accurate and helpful data about their enrollment before we make it a self-service offering online. So watch for this in the coming year.)

We are reworking our membership reports after recently discovering an error that over-reported membership levels by roughly 1%. There is no error in the data; the error was a miscalculation in the reports. The trends we've been seeing are still accurate (including the membership increase in the last few months). However, it's imperative that we correct this ASAP, and it's the current top priority.

We are also exploring a transition to a new merchant/gateway vendor for payment processing. Our current gateway vendor is Authorize.net. The new vendor, CardConnect, is the preferred partner for NimbleAMS and offers an impressive list of features that improve tracking and would allow us to offer new payment options for customers in the future.

Many other minor projects related to the AMS, more than this space allows, are also moving through the to-do list. We are seeing the benefits from our investment in this powerful system, but there is still more to come. Every day it's getting better and better!

Invoice Processing

SAP Concur setup and implementation started in late October, after a short delay due to audit schedules. We hope to begin processing invoices and other payments through this cloud-based system in mid-December, with the roll out of reimbursement and travel processing in early spring of 2021.